



Client Relationship Manager ***[Optional Path to Wealth Manager]***

Introduction:

Our firm is growing, and we're looking for someone who will become one of the most important people on our team. We're hiring a Client Relationship Manager, but this is not a traditional administrative or client service position. We envision this person becoming the heartbeat of our client relationships, someone long-standing clients come to know, trust, and rely upon for years. Financial planning at Haas Financial Group is a team effort. Our Wealth Managers provide advice, Financial Planners bring data and analysis, and Operations handles administrative processes. The Client Relationship Manager connects these specialties, coordinating client communication, meeting preparation, and follow-through while ensuring we're always focused on what matters most to our clients. This role offers meaningful responsibility and multiple paths for growth, including the opportunity to become a Wealth Manager. But it can also be a rewarding long-term career in itself. Financial services experience is helpful, not required. We're looking first for someone unusually good with people: warm, curious, organized, accountable, an excellent communicator, and genuinely motivated to help others.

About Us:

Haas Financial Group is an RIA-only wealth management firm guiding clients through a well-defined and repeatable financial planning process, with the ability to coordinate the services of all specialized financial professionals in our clients' lives – including estate planners, legal, and tax advisors – with investment management services. We focus on behavioral finance and the human side of our client relationships with a mission to align our client's values, vision, and wealth. Learn more about us and who we serve at

www.haasfinancialgroup.com

Personal & Professional Values:

- ☐ Enjoys building and maintaining relationships by being a thoughtful listener and clear communicator
- ☐ Takes ownership when someone needs help and follows through until the issue is resolved
- ☐ Is ethical and always does what is best for the client
- ☐ Is warm, curious, organized, dependable, and attentive to details
- ☐ Can work independently while collaborating closely with a team
- ☐ Is coachable, intellectually curious, and committed to continuous learning

Job Responsibilities:

- ☐ Serve as a primary point of contact for clients between planning meetings, helping answer questions, coordinate needs, and communicate progress and next steps.
- ☐ Prepare for client meetings by coordinating with the Wealth Manager and Financial Planner, organizing priorities, client information, planning materials, and outstanding items.
- ☐ Participate in client meetings and own the follow-through afterward: organize decisions and next steps, maintain accurate CRM records, coordinate responsibilities, and drive open items toward completion.
- ☐ Lead implementation of approved planning recommendations and multi-step service needs, coordinating with clients, Wealth Managers, Financial Planners, Operations, custodians, and other partners while keeping clients informed.
- ☐ Support proactive client engagement through timely outreach, planning reminders, Knudge campaigns, milestones, and other thoughtful touches between formal meetings.
- ☐ Use good judgment to resolve service needs independently when appropriate and quickly involve the Wealth Manager or Financial Planner when advice or additional expertise is required.
- ☐ Help improve client workflows, communication, and service processes so the client experiences one coordinated HFG team.

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Qualifications and Critical Skills

- ☐ Bachelor's degree or equivalent professional experience preferred
- ☐ Several years of experience in a client-facing professional environment is valuable; financial-services experience is helpful but not required
- ☐ Excellent written and verbal communication skills with warmth, professionalism, and clarity
- ☐ Strong organizational skills, attention to detail, and ability to manage multiple open items through completion
- ☐ Natural curiosity, thoughtful listening skills, sound judgment, and a client-first mindset
- ☐ Comfort learning new technology and systems; experience with CRM or financial-planning tools is a plus
- ☐ Accountability, initiative, problem-solving ability, and willingness to ask questions and be coached

Our Hiring Process:

- ☐ Step #1 – Submit your resume and a short response (200 words or less) describing a time you made someone feel especially well taken care of. What did you notice, and what did you do?
- ☐ Step #2 – Introductory conversation to learn more about you and what you are looking for
- ☐ Step #3 – Skills interview with HFG team focused on communication, curiosity, judgment, organization, and client-service exercises
- ☐ Step #4 – Final fit conversation

Terms of Employment:

- ☐ Starting salary between \$78,000 and \$92,000. This will be determined by your education/credentials, and the years of experience you already have in a relationship-driven field
- ☐ Discretionary annual bonus up to 10% of pay based on your ability to impact our client relationships
- ☐ Discretionary year-end profit sharing for all team members as % of pay based on tenure with firm
- ☐ Employer Provided Benefits include:
 - Healthcare (100% of employee cost covered) with optional Health Savings Account
 - Ability to add spouse and dependents (covered at 50% of cost)
 - Optional vision and dental insurance at your own expense
 - 401(k) plan with 3% safe harbor match (both pre-tax and post-tax saving options)
- ☐ Paid time off (10 days in year one, 12 in year two) and holidays

Our Thought on Who Should Apply:

This role is for someone who is unusually good with people and wants their work to matter. You may come from wealth management, banking, professional services, hospitality, healthcare, customer success, higher education, or another relationship-driven field. We care more about your ability to make people feel understood, supported, and well cared for than whether you already know financial-planning jargon. The right person asks good questions, communicates with warmth and clarity, remembers details, takes ownership, and wants to grow. There is more than one long-term path: you may deepen your career in client relationship management or develop further into financial planning and Wealth Manager responsibilities.

Location:

We are located in Kutztown, PA. Face-to-face interaction is important for working as a team and for some of our clients. However, our process and use of technology at all stages of our relationships make us fully functional for a remote working environment when necessary. The expectation will be to utilize our joint office space no less than as necessary for clients, while having flexibility to work remotely as well based on your personal situation. As a company we value work-life balance as long as our clients are served, and our work is completed.

Next Steps

To apply, please send your resume and requested short response, along with any other materials you think would be helpful, such as a LinkedIn profile or letters of recommendation, to info@haasfinancialgroup.com